



# HMIS Guides

## HMIS Overview for New Users

September 2020

A brief overview of our HMIS

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## Login:

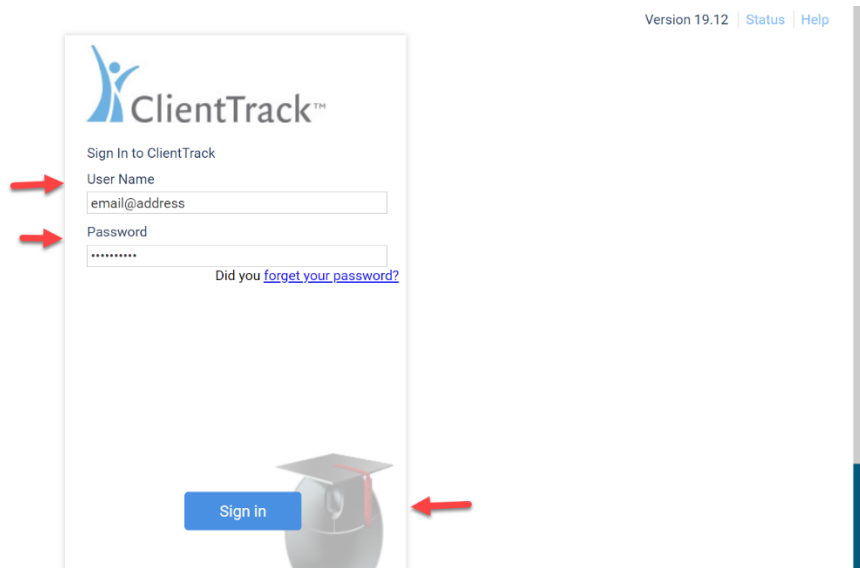
**To log into HMIS use the following URL's**

### **Training site URL**

[https://usw.clienttrack.net/19/Login.aspx?CustomerID=PA\\_HMIS\\_Train&Inline=true](https://usw.clienttrack.net/19/Login.aspx?CustomerID=PA_HMIS_Train&Inline=true)

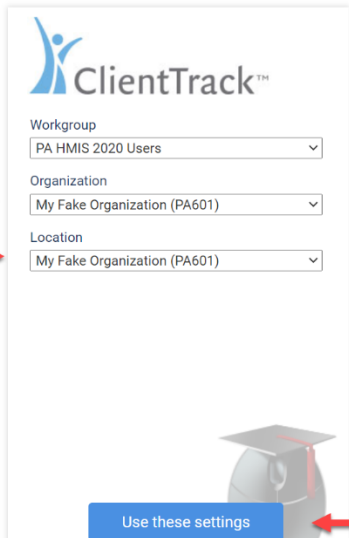
### **Production site URL**

[https://www.clienttrack.net/pa\\_hmis](https://www.clienttrack.net/pa_hmis)



**After going to the URL the next step is to enter a username. The username is the email address supplied on the signed User Agreement. Next is the password entry. The temporary password that came in the confirmation email will have to be changed the first time the system is logged into. After entering the username and password click on the Sign In button.**

**\*Note – The mouse with the graduation cap means logging into Training, if its not there then the Production environment is being accessed.**

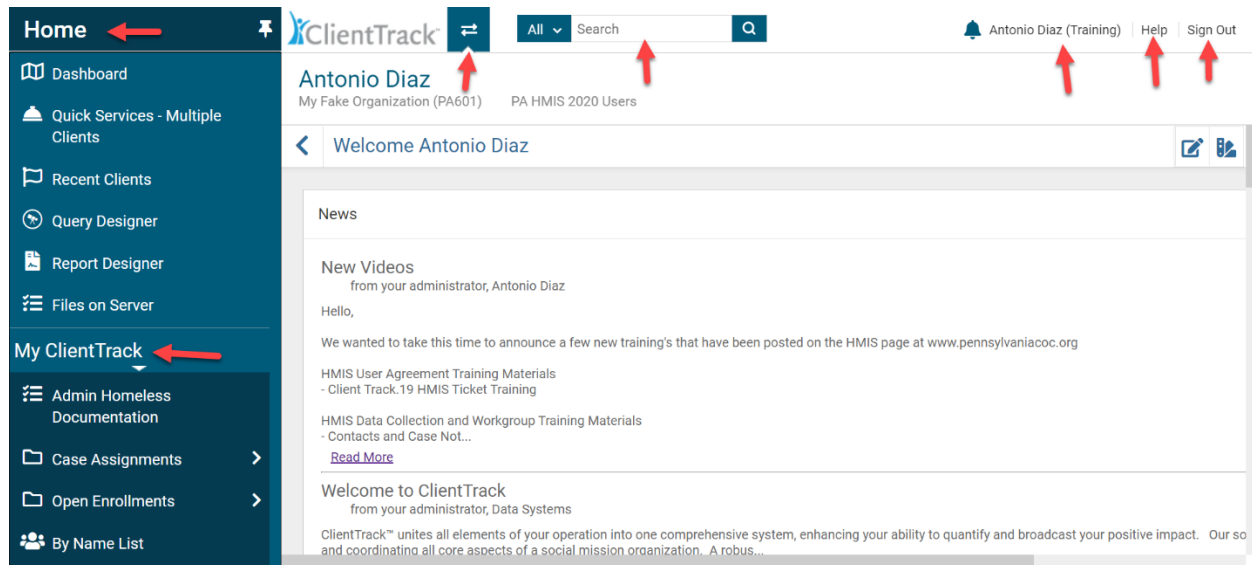


The image shows a 'ClientTrack' login settings dialog box. It features the ClientTrack logo at the top. Below the logo are three dropdown menus: 'Workgroup' (selected: PA HMIS 2020 Users), 'Organization' (selected: My Fake Organization (PA601)), and 'Location' (selected: My Fake Organization (PA601)). Three red arrows point to each of these dropdown menus. At the bottom of the dialog is a blue button labeled 'Use these settings' with a graduation cap icon above it. A red arrow points to this button.

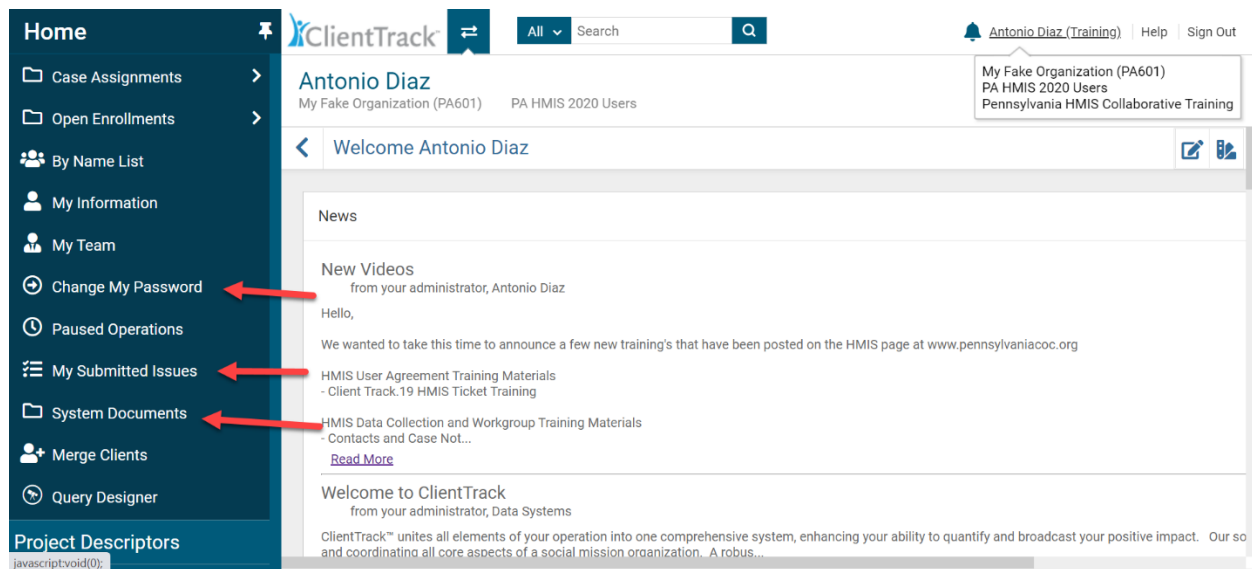
**Once signed in workgroup, organization, and location need to be selected. All three of these will open with a dropdown menu to allow the user to choose from the options listed. After the settings are chosen click on Use these settings.**

## Workspace

**All workspaces in HMIS will include the following. The Menu will always be on the left side of the screen and the name of the workspace that is being accessed will always be at the top of the menu. The menu itself will consist of sub-menus that can be opened. All workspaces will have the Client Track logo with a flag bearing two arrows going opposite directions. Clicking on the flag will open the Carousel. From the Carousel the different workspaces can be found. Next will be the Search box. From here searches can be done for items in HMIS. On the far right of the screen will appear the name of the user who is logged in, HELP, and Sign Out. By clicking on the name of the user who is logged in a dialog box will open allowing the user to change workgroups, organizations, locations without having to log out. The word HELP when clicked on will open a dialog box that allows a user to report an issue, ask a question, or make a suggestion.**



## Home Workspace



**In the Home workspace on the side menu are some important functions for new users.**

- 1. The change password setting, which allows a user to change their password at any time.**

**2. My Submitted Issues, clicking on this will take a user to all the tickets that they have submitted.**

**3. System documents, clicking on this will take the user to the system user documents page. Here there are a variety of postings on specific topics related to HMIS.**

My ClientTrack

Case Assignments

Open Enrollments

By Name List

My Information

My Team

Change My Password

Paused Operations

My Submitted Issues

System Documents

System Documents

Document Category: -- SELECT --

89 results found.

Document Description	Document Category	Document Name	Upload Date
Validation File - Details File	Training and Reference Materials	Validation File - Detail ...	8/10/2020
Data Standards June 2020	Training and Reference Materials	HMIS-Data-Standards- Manua...	8/10/2020
Data Dictionary June 2020	Training and Reference Materials	HMIS-Data-Dictionary june	8/10/2020
APR Report Guide Step by Step	Training and Reference Materials	APR Report Guide Step by ...	8/10/2020
Connect to Home Eastern CoC Coordinated Entry Guide	System Feature Guides	Connect To Home CES HMIS ...	9/27/2019

Cancel

## Clients Workspace

**The Client Workspace is where a user will specifically deal with Clients, from this workspace intake workflows will be done. By using the menu on the left side of the screen several functions can be assessed.**

- 1. The Client Dashboard can be accessed.**
- 2. The Find Client Feature can be accessed.**
- 3. The Intake Workflow can be started.**

**ClientTrack** | All | Search | Antonio Diaz (Training) | Help | Sign Out

**Clients**

- Dashboard
- Find Client
- Intake**
- COVID-19 Intake

**Profile**

- Edit Client
- Alias History
- Address History
- Case Managers
- Case Notes
- Client Files
- Client Photo

**Duff Mick's Dashboard**

**Duff Mick's Information**

	<b>Name:</b> Mick, Duff	<b>Birth Date:</b> 9/13/1988	<b>Age:</b> 32
	<b>Gender:</b> Male		<b>Veteran:</b> Yes
	<b>Ethnicity:</b> Non-Hispanic/Latino	<b>Race:</b> White	

**Duff's Enrollments** | 1 result found.

**Duff's Services** | No records found.

**When selecting the Intake option, the workflow will open to begin collecting the client information. With the workflow open, sections upcoming and done are tracked by the listings to left of form. By clicking on the two lines above the listings the workflow can be paused. By clicking on the X, the workflow can be exited. When doing this the workflow will save to the last section completed. For example, if you exit during the third section the first two will be saved.**

**ClientTrack** | All | Search | Antonio Diaz (Training) | Help | Sign Out

**Clients**

- Dashboard
- Find Client
- Intake**
- COVID-19 Intake

**Profile**

- Edit Client
- Alias History
- Address History
- Case Managers
- Case Notes
- Client Files
- Client Photo

**Duff Mick** | 9/13/1988 | Male | CLIENTID 510

**Intake (2298)**

- Add or Edit**
- Basic Client Information
- Family Members
- Program Enrollment

**Add or Edit**

Do you want to add a new client or use the selected client?

- 
- 
-

**The side menu of the Client Workspace will also include all the different assessments in HMIS.**

The screenshot shows the ClientTrack Client Workspace. The left sidebar contains a menu with the following items: Clients, Information Release, Information Release Exceptions, Interested Others, Current Living Situation, Notifications, Veteran Information, Common Assessments, Other Assessments, Enrollment and Services, RHY Assessments, and SPDAT Assessments. Red arrows point to the last five items. The main content area displays 'Duff Mick's Dashboard' for a client named Duff Mick (9/13/1988, Male, CLIENTID 510). The dashboard includes a profile card with personal information and sections for 'Duff's Enrollments' and 'Duff's Services'.

## Provider Workspace

**In the provider workspace is where a user will be able to find and access providers.**

The screenshot shows the ClientTrack Provider Workspace. The left sidebar contains a menu with the following items: Providers, Find Provider, Add New Provider, Provider Dashboard, Provider, Edit, Contracted Services, Provider Alias History, Files, Contacts, Contact Log, Referrals to Selected Provider, and Data Exchange Endpoints. Red arrows point to 'Find Provider', 'Add New Provider', and 'Provider Dashboard'. The main content area displays 'My Fake Organization - Emergency Shelter' with a 'Provider Identification Info' form. The form contains the following information: Provider Name: My Fake Organization - Emergency Shelter, Address: 1234 Main Street, Zip Code: 16601, City: Altoona, State: PA, Phone: , Referral E-mail: . At the bottom right of the form are 'Save' and 'Cancel' buttons.



**From the providers dashboard address and contact information, services, waitlist, clients referred can all be found. By scrolling to the bottom of the dashboard the referred clients can be seen. Clicking on the blue action button a client referral can be accepted, rejected, or the referral information form can be accessed.**

**Providers** ClientTrack All Search Antonio Diaz (Training) Help Sign Out

My Fake Organization - Emergency Shelter

My Fake Organization (PA601)  
PA HMIS 2020 Users  
Pennsylvania HMIS Collaborative Training

Clients Referred to My Fake Organization - Emergency Shelter

Displaying 1-10 of 59 results. Next Last

Referring Provider	Client Name	Referral Service	Referral Program	Referral Date	Status	Acknowledge
Pending						
My Fake Organization - Emergency Shelter	ShihTzu, Sammy	Emergency Shelter Housing		08/25/2020	Pending	
My Fake Organization - Emergency Shelter	Central, Sam	Emergency Shelter Housing		08/07/2020	Pending	
My Fake Organization - Emergency Shelter	Joe, Billybob	Emergency Shelter Housing		08/06/2020	Pending	
My Fake Organization - Emergency Shelter	Crab DV, Sebastian Anderson	Emergency Shelter Housing		08/05/2020	Pending	
My Fake Organization - Emergency Shelter	Frozen, Olaf Anderson	Emergency Shelter Housing		08/04/2020	Pending	
My Fake Organization - Emergency Shelter	Dog, Goofy Le-Propor	Emergency Shelter		08/04/2020	Pending	

Provider Dashboard

Provider

- Edit
- Contracted Services
- Provider Alias History
- Files
- Contacts
- Contact Log
- Referrals to Selected Provider
- Data Exchange Endpoints

Accept/Reject Referral

Referral Information Form

**Providers** Referral Information Form Antonio Diaz (Training) Help Sign Out

**Service Referral Form**  
Client: Central, Sam  
Referral Date: 8/7/2020

**Referring Provider**

Provider: My Fake Organization (PA601)  
Main Address: 1234 Main Street - Williamsport PA, 17701  
Main Telephone: 555-555-5555 Website:  
Primary Contact:

Referred By: Nicholas Bross  
Service Request: Emergency Shelter Housing

**Client Information**

Primary Client: Central, Sam  
Age: 41 Gender: Female  
Household Members: No Household Members

**Refer To Provider**

Provider: My Fake Organization - Emergency Shelter  
Main Address: 1234 Main Street - Altoona PA, 16601  
Main Telephone: Website:  
Primary Contact:

Referral Date	Status	Acknowledge
08/25/2020	Pending	
08/07/2020	Pending	
08/06/2020	Pending	
08/05/2020	Pending	
08/04/2020	Pending	
08/04/2020	Pending	
08/04/2020	Pending	08/04/2020

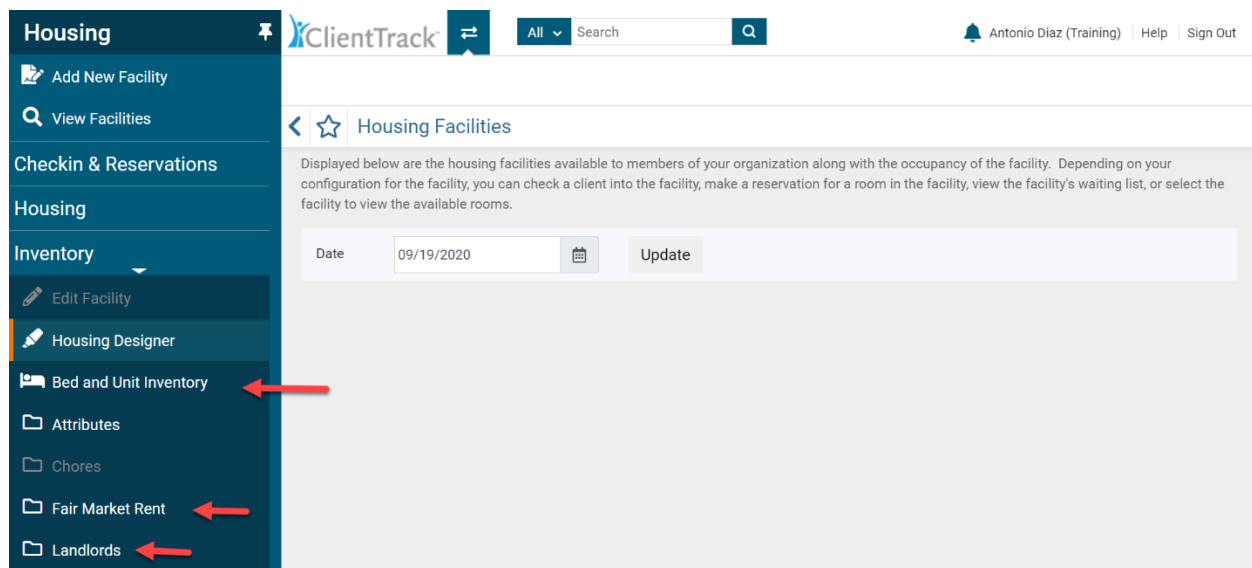
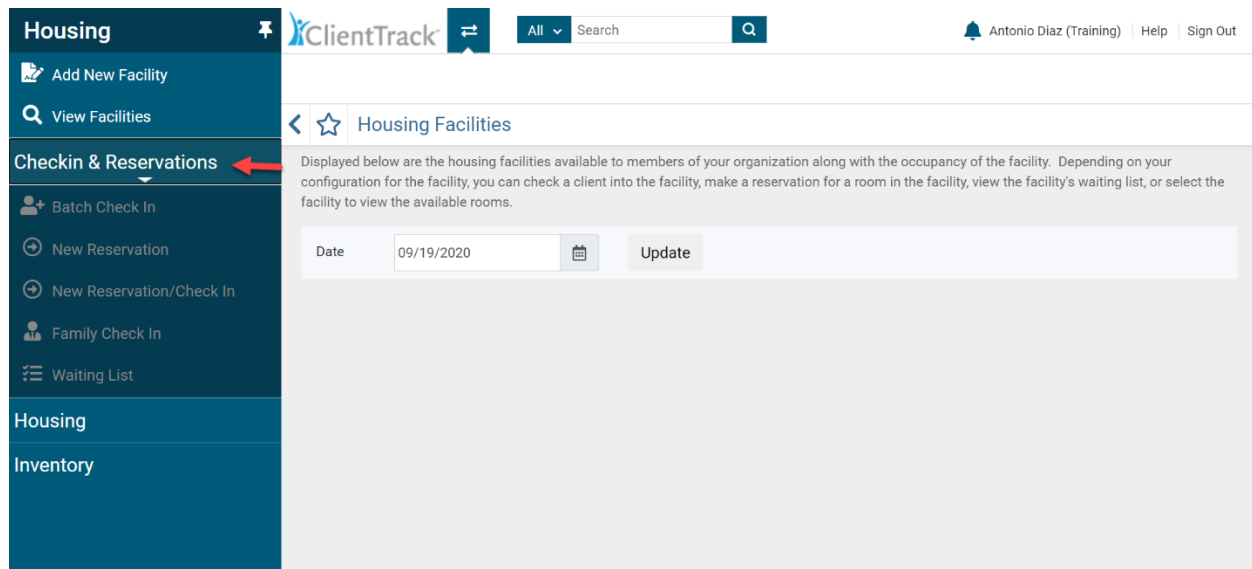
Provider Dashboard

Provider

- Edit
- Contracted Services
- Provider Alias History
- Files
- Contacts
- Contact Log
- Referrals to Selected Provider
- Data Exchange Endpoints

## Housing Workspace

**In the housing workspace a user will be able to view facilities. Edit and maintain a bed and unit inventory, look up fare market rent and enter landlord/complex information. From this workspace check-ins and reservations can also be done.**



## Reporting Workspace

**This workspace houses the reporting for HMIS. Here can be found annual reports such as the CAPER and APR. Also included are reports for Clients, Enrollments, Referrals, and Services.**

The screenshot shows the ClientTrack Reports menu on the left. Red arrows point to the following items: CSV APR - FY2020, CSV CAPER - FY2020, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main area shows the ClientTrack Dashboard.

**Some reports will run in a few minutes and load. This is true for most reports that are not annual reports. Annual reports such as the CAPER and APR will take longer to run. When these reports run they take a while to complete. When they are done, they are loaded onto the Files on Server. Here they will be available for downloading (paper with green arrow) or deleting (blue X) when done.**

The screenshot shows the ClientTrack Files on Server page. A red arrow points to the 'Files on Server' menu item. Below the menu, a table lists the files available for download. Each row has a green arrow icon for download and a blue X icon for delete. A tooltip for the user 'My Fake Organization (PA601)' is visible.

File Name	Creator	Created	Expires
HMIS RHY CSV 2020 Export_20200827160906_TaskID_202732.zip	Antonio Diaz	8/27/2020 4:09:06 PM	8/27/2021 11:09:06 AM
HMIS APR_CAPER 2020 Validation_20200801004509_TaskID_197709.zip	Antonio Diaz	8/1/2020 12:45:09 AM	7/31/2021 7:45:09 PM
HMIS APR 2020 Export_20200801004501_TaskID_197708.zip	Antonio Diaz	8/1/2020 12:45:01 AM	7/31/2021 7:45:01 PM
HMIS APR_CAPER 2020 Pre-Load_20200801003459_TaskID_197707.zip	Antonio Diaz	8/1/2020 12:35:00 AM	7/31/2021 7:34:59 PM
HMIS APR_CAPER 2020 Validation_20200801000515_TaskID_197706.zip	Antonio Diaz	8/1/2020 12:05:15 AM	7/31/2021 7:05:15 PM
HMIS APR 2020 Export_20200801000508_TaskID_197705.zip	Antonio Diaz	8/1/2020 12:05:08 AM	7/31/2021 7:05:08 PM
HMIS APR_CAPER 2020 Validation_20200731233510_TaskID_197703.zip	Antonio Diaz	7/31/2020 11:35:10 PM	7/31/2021 6:35:10 PM